



## STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**

Forms Design Coordinator

**Job Code Title**

Editor

**Pay Band**

06

**Job Code Number**

273415

**Citizen Services and Resource Management Division**

Citizen Services Bureau

**Fair Labor Standards Act**

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Citizen Services and Resource Management Division administers the accounting, purchasing, safety, security, statewide facility functions, call center, forms design, one-stop business licensing coordination, and receipt and distribution of unclaimed property. The division includes the Financial and Asset Management Bureau and the Citizen Services Bureau. The Citizen Services Bureau operates the Call Center whereby citizens can call with questions, inquire about their tax accounts, and get the information needed to conduct business with the department; administers the One-Stop Licensing Program which is a one-stop shopping for businesses to register and renew their business licenses from numerous agencies participating in the program; advertises unclaimed property that has been turned over to the state in an effort to locate the rightful owners and processes claims for the return of the property; and coordinates the annual design of forms, tax returns, and instructions for administering taxes and licenses.

**Job Responsibilities**

The Forms Design Coordinator reviews, researches, and coordinates the design and development of all department electronic and paper forms, instructions, publications, and coupons for all tax types to simplify forms and instructions and improve efficiency and customer service. The position reports to the Citizen Services Bureau Chief and does not supervise other staff.

- **Design Project Coordination 65%**

1. Develops and coordinates plans and procedures for analyzing, improving, standardizing, and simplifying forms, booklets, scannable payment vouchers, and correspondence. Assesses current operations and future needs, available technologies, and business objectives to establish forms design objectives and determine performance measures.
2. Directs and coordinates forms design projects and activities based on overall program plans and specific project objectives, timelines, budgets, staff support, technologies, and procedures. Develops work plans to achieve project objectives efficiently. Provides updates to staff and supervisors, resolves technical and procedural problems, and delivers forms design projects as specified in work plans.

3. Identifies areas that may be enhanced from the application of new forms technology. Evaluates the effectiveness of new or alternative technologies (software, scanners, etc.). Analyzes current forms, technologies, and business procedures to determine needs and opportunities for enhancement. Integrates new technology into the forms production and processes.
4. Coordinates and facilitates workgroups to evaluate and recommend form structures or revisions to improve clarity, accuracy, consistency, and compliance. Selects appropriate participants based on federal and state law changes, target audiences, and potential users including agency specialists, members of the public, and CPA's to assist with various changes to tax booklets, forms, and instructions.
5. Drafts, reviews, and edits forms, booklets, instructions, coupons, and other documents in a manner easily understood by the general public and in compliance with department writing requirements. Selects suitable language and presentation to facilitate conformance with complex laws and specific procedures when filing a return.
6. Develops and communicates specifications for forms and guidelines for reproduction of payment vouchers and scannable forms needs to printing vendors, software companies, other divisions, information technology developers, and remittance processing scanning technicians.
7. Analyzes and approves computer-generated forms from vendors to ensure compliance with department policies and state tax laws. Coordinates testing and approval of payment vouchers and scannable forms created by printing vendors and software companies. Identifies and resolves errors, discrepancies, and other problems through manual corrections or coordination with printing vendors and software companies.
8. Develops electronic forms and tools to provide access to online documents and procedures. Develops fill-in and self-calculating forms. Develops test scripts and guidelines for reproduction of forms online. Coordinates with information systems specialists to test production data. Coordinates with involved or affected divisions to incorporate input and resolve problems.
9. Develops and coordinates public information strategies to explain forms and instructions changes to taxpayers, software vendors, and tax preparers. Coordinates with agency public information officer, division staff, and others to implement strategies. Resolves common problems and areas of confusion as the liaison between department work units, taxpayers, tax preparers, federal government entities, outside vendors, and software developers.

- **Program and Project Support Services 30%**

1. Maintains an electronic forms repository to store current and archival documents. Ensures accessibility and organization of stored documents. Coordinates with the website update team to upload new or revised forms to ensure current versions are available online.
2. Provides support and technical assistance to taxpayers and employees regarding forms and processing. Issues notices and updates.
3. Researches and compiles specialized reports as requested by supervisors.
4. Reviews existing forms and coordinates updates on an annual basis with business experts.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the supervisor.

### **Job Requirements**

To perform successfully as a forms design coordinator, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that the incumbent has the ability to visualize effects of changes to forms. Skills in critical thinking; training; multi-tasking; ensuring quality control; customer service; conflict resolution; researching, compiling, and analyzing data from multiple sources; following written and oral directions and instructions; and word processing, spreadsheet, and database applications are required.

Incumbent is required to maintain accuracy and attention to detail; provide timely and effective written, verbal, and interpersonal communication; make logical decisions; build relationships with customers and vendors; and exercise discretion and judgment in handling confidential and sensitive information. This position requires knowledge of print and online publishing and design principles; editorial standards; business communications; agency business processes; individual tax types; and project management.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in business administration, public administration, or related field and two years of directly related experience.
  - Experience should be made up of in technical writing and editing, contract management, project leadership, and forms technology including desktop publishing software.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. Work hours may exceed 40 hours per week from time to time. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

**Special requirements**

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Steve Austin, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_